

Guide to Using Multi-Site Link

Table of Contents

- Introduction 2**
- General Information..... 3**
- Getting Started 4**
 - About Getting Started 4
 - General Overview 4
 - Set Up Type Information 5
 - Adding Site Information 5
 - Filter Site Information 5
 - Add Site Information 5
 - GlobaFILE Information Tab 5
 - Site Information Tab 6
 - Security Tab 7
 - Memo Tab 7
- Other Applications 8**
 - About Other Applications 8
 - Attendance 8
 - Contributions 8
 - General Ledger..... 9
 - GlobaFILE 9
 - Loan Processing 9
 - Membership..... 9
 - Payroll 10
 - Purchase Order 10
 - Receipting 10
 - Remittance 10
 - Selections and Listings..... 10
 - Security 10
- For More Help 12**
 - Contact Us 12
- Index 13**

Introduction



Multi-Site Link

Copyright © 2009 - All rights reserved

Shelby Systems, Inc.

7345 Goodlett Farms Parkway


Cordova, TN 38016

06/22/09

Often when you attempt to accomplish an ordinary project on your computer, you find yourself blocked because you are unable to find the information you need to get you through the job. When you consult a Manual or On-Line Help, you sometimes encounter writing that is vague or so technical that only a computer engineer could understand it. All you really want is help when you are in the middle of a task and need some instruction so you can get back to work.

Shelby Systems takes a new and different approach to making the Manuals and On-Line Help easy to read and understand. The Table of Contents tells you exactly what is in the Manual or On-Line Help and where to find it. The Index helps you find what you need fast. The text is designed in a format consisting of How to tasks and sub-tasks based on easy to follow step-by-step procedures with no technical terms and no unfamiliar, hard to understand language.


Please review the information contained in the General Operation Guide to become familiar with the basic functions of the Shelby Software, its requirements, and many of the functions that apply to more than one application.

 Please note that any hyperlinks or buttons which allow you to go to another help file or supplemental document are active only within the On-Line Help files. If you are viewing the On-Line Documentation through Acrobat Reader, go to the area that the link refers to (perhaps another module or document) for more information.

General Information

Description:

The Multi-Site Link module provides software to associate different congregations in a hierarchy. MSL gives the best data exchange solution available for organizations having multiple entities associated with them. Examples of organizations using this software are denominational offices with associated parishes and churches, and churches sponsoring other worship sites that remain associated with the main or host church.

 When using this module, make sure that you select the correct organization before entering Attendance information.

Features:

- Connectivity for data exchange between the main organization and an unlimited number of its associated entities
- Data tracked: contact information, tax ID numbers, leadership, meeting times, memo fields, and church/unit alias
- Internet connectivity via Microsoft Terminal Services
- One database using Shelby GlobaFILE
- One consolidated chart of accounts
- Management for up to six vertical organization levels
- Management for an unlimited number of sites within each level
- Multiple security options
- Integration with other Shelby management modules: Membership, Attendance, Contributions and the financial applications
- Security allows only approved users to work with specified organizations

Benefits:

- Assures accuracy of each individual's data: John could be a member at Site A, attend a small group at Site B, and visit and contribute to Site C, but one database assures that his activity is consolidated to one record
- Provides easy access to data: Anyone with security clearance may access the data any time, any place
- Encourages using volunteers with straight-forward design
- Minimal hardware requirements since the central office houses all programs and data
- Allows each site to be as active as desired. All the software applications owned by the main church become available to the sites; they determine the extent to which they go beyond minimal record keeping related to attendance and contribution.
- Saves time and money related to mailings, such as newsletters and contribution statements, by doing bulk mailing.
- Relieves sites of doing heavy accounting activities such as generating payroll and vendor checks since these can be handled by the main church.
- Gives management flexibility that reflects the organization's unique structure.

Requirements for Each Site:

- Broadband Internet connection
- Microsoft Terminal Services

Requirements for Main Organization:

- Broadband Internet connection
- Microsoft Terminal Services
- Server to host programs and data for all sites
- Shelby software to support desired data tracking such as Membership, Attendance, etc.

Getting Started

About Getting Started

There are various steps required in order to begin using Multi-Site Link. This section reviews the steps involved in each of the procedures needed.

Prerequisite – Set up Companies for all sites. Set up Master Chart of Accounts if needed. Set up Account structure for all sites. Then set up your sites.

This section covers:

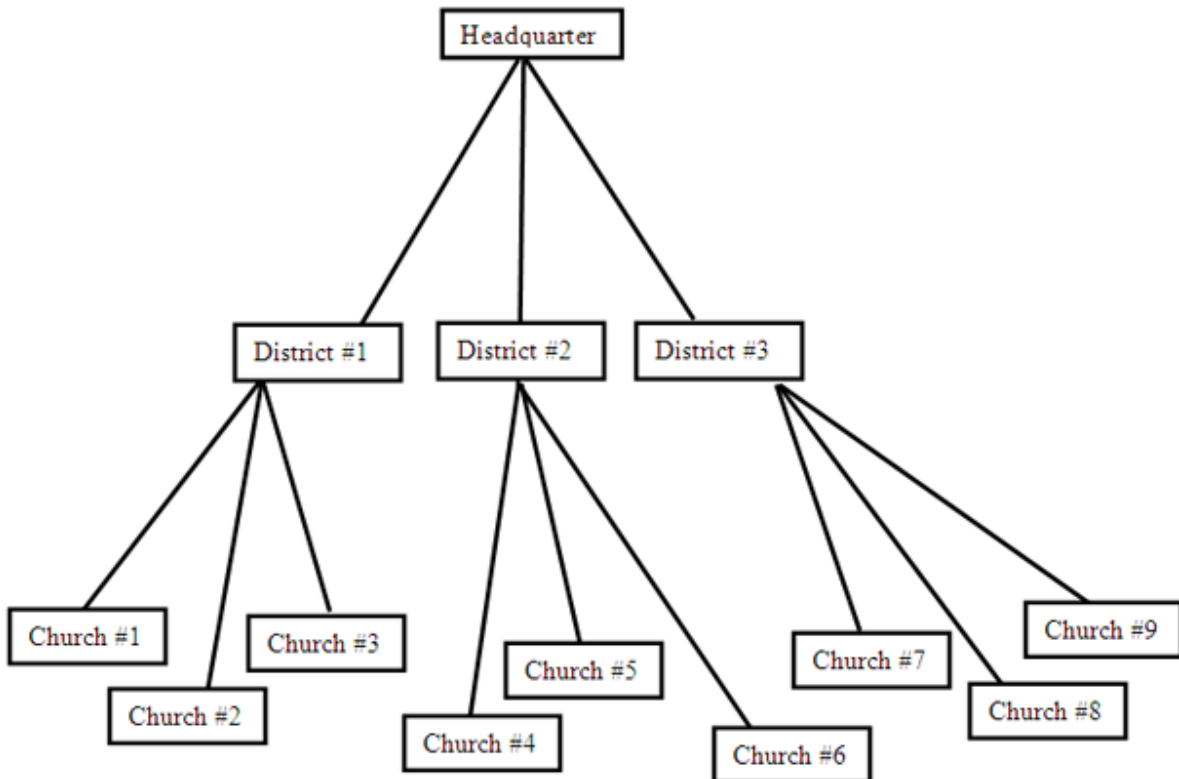
- [General Overview](#)
- [Set Up Type Information](#)

Adding Site Information

- [Filter Site Information](#)
- [Add Site Information](#)
- [GloBAFILE Information Tab](#)
- [Site Information Tab](#)
- [Security Tab](#)
- [Memo Tab](#)

General Overview


The Multi-Site Link creates a pyramid structure. The hierarchy starts from the top down. Headquarters is the top level where no security is assigned. The second level, District #1, reports to the Headquarter level. The church level reports to District #1 which reports to the Headquarters level above.



Set Up Type Information

You will need to define organization Types before entering your Multi-Site Link information.

1. From the **Home Base** screen, click **Utility** from the menu bar.
2. Choose **Type Information** from the drop down list.
3. Enter the **Sequence** number for each type (1 through 6). One being the highest in the hierarchy and higher numbers being sub-groups.





 The number **1** should always be used for headquarters. The number **6** should always be used for the congregation.


4. Enter the **Description** name for each type (ex. Field, Mission Center, Region, Stake, Dev Area, District, Metropole, Area, National Church, Branch, Campground, Congregation, Emerging Congregation, Mission, etc.).
5. Highlight a line and click the **Delete** button to remove a line.
6. Click **OK** when finished.

Adding Site Information

Filter Site Information


Follow the steps below to view any multi-site(s).

1. From **Home Base**, click **Site Information**.
2. You are now on the **Site Criteria:** screen. Type in filtering information here to view only certain sites or leave blank to view all sites. You may filter on any of the available fields. Click **Clear Filters** to remove all parameters from the criteria screen.
 - **ID - type the site ID number or leave blank for all.**
 - **Level/Type - select from the drop down list** .
 - **Description - type the Description or leave blank for all.**
 - **Purpose Codes Only - select from the drop down list** .
 - **Reports To - click**  **to Pick from available selections.**
 - **User ID Security - select from the drop down list** .
3. Click **OK** to continue.
4. You are now on the **Site Information** screen.

 You can go back to the **Site Criteria:** screen at any time by clicking the **Criteria** button.

Add Site Information

Follow the steps below to add a new site.

1. From the **Site Information** screen, click the **New**  **Icon** located on the tool bar to add or press the right mouse button anywhere in the grid and click **New** from the available choices or click **File** from the menu bar and then click **New**.
2. Refer to [Working With Global Information](#) to add a name and general information that does not already exist.
3. Proceed to the [GlobaFILE Information Tab](#) to continue the process.

GlobaFILE Information Tab

1. Click the **GlobaFILE Information** tab.
2. The following GlobaFILE Information previously established displays.
 - **Address 1**
 - **Address 2**
 - **City**
 - **State**
 - **Postal Code**
 - **Phone #**

- **Federal ID #**


GlobaFILE Information




Use the **GlobaFILE Information** button to access and modify GlobaFILE Information if needed.

3. Proceed to the [Site Information Tab](#) to continue the process.


Site Information Tab


1. Click the **Site Information** tab.
2. Fill in the information as needed.
 - **ID** - type a user defined reference number (required).
 - **Active?** - check the box if this site is active. Un-checking this box will allow you to enter the Date Disorganized and will cause the site to no longer appear on the Home Base Site selection field for the following modules: GlobaFILE, Membership, Prospects, Miscellaneous Names, Attendance, and Contributions. Inactive sites will not appear when searching for a site from a GlobaFILE record or when using the Membership Transfer.
 - **Purpose Codes Only?** - check this box if the site is only used for creating Contribution purpose codes.



 This feature is used as a way for headquarters to receive money from multiple level six sites. For example, a level two site can be established as a Purpose Code Only site and report to a level one site. All of the level six sites that report to the level one site will be able to use the level two site Purposes that have been established in the Contributions module.


- **Description** - type the name of the site (e.g., Abundant Life Fellowship). This is the description that will appear throughout the program.
- **Reports To** - click  to pick the site that this site reports to.
- **Date Organized** - type the date or click  to select from ShelbyDATE.
- **Date Disorganized** - type the date this site is split up/disbanded or click  to select from ShelbyDATE (required).


 Only available if the **Active** check box is not marked.

- **Co #** - type the company number (established in General Ledger) for this site or click  to **Pick from available selections.**

 Company must be specified in order for the site to be available in the Contributions module.


- **Super Fund #** - type the Super Fund number (established in General Ledger) for this site or click  to **Pick from available selections.**
- **Fund #** - type the Fund number (established in General Ledger) for this site or click  to **Pick from available selections.**

 Specifying a Super Fund and/or Fund will limit the users of this site to only be able to use the Super Fund and/or Fund specified. In most situations, the company number will be specific for each site and the Super Fund/Fund will be left blank.

- **Currency Conversion Ratio** - type the ratio if this organization uses a foreign currency.
- **Level/Type** - select from the drop down list .




 Refer to [Set Up Type Information](#) for more details.

- **Also Known As** - type any other name for the site (e.g., Abundant Grace)..
- **Type** - The grid displays the higher level sites that this site reports to.
- **Assigned To** - The grid displays the higher level sites that this site reports to.


- **Primary Contact** - type a letter or click  to **Pick a Name** from GlobaFILE.
3. Proceed to the [Security Tab](#) to continue the process.

Security Tab

If no Multi-Site Link rights are assigned to an individual, then they will have rights to all sites.

1. Click the **Security** tab.
2. Move the names of the users that you want to be able to work with this Site from the **No Rights** to the **Have Rights** column. To do this you can either double click the name, drag and drop the name, or highlight a name and use the **Right Hand**  icon.
3. To move a name from the Have Rights to the No Rights column, just do the reverse of step 2.
4. Use the **Up Hand**  and **Down Hand**  icons to change the order of the names within a column.
5. Proceed to the [Memo Tab](#) to continue the process.


Memo Tab

1. Click the **Memo** tab.
2. Type any notes needed for this site into the upper box.
3. Any historical changes for this record should be typed into the **Change History** section.
4. Click **OK** to complete the process.
5. Notice that the new Site displays on the grid.
6. Click the **Close**  **Icon** to return to the **Home Base** screen.

Other Applications

About Other Applications

This section shows how the Multi-Site Link program affects other applications within Shelby v5.

 If an individual is only set up with rights to one site, then the Site pick option will not be available.


Prerequisite – You will need to purchase and set up information in the following modules before the Multi-Site Link options are enabled.

This section covers:

- [Attendance](#)
- [Contributions](#)
- [General Ledger](#)
- [GlobaFILE](#)
- [Loan Processing](#)
- [Membership](#)
- [Payroll](#)
- [Purchase Order](#)
- [Receipting](#)
- [Remittance](#)
- [Selections and Listings](#)
- [Security](#)


Attendance

These options are active in Attendance if you own the Shelby Multi-Site Link program. Please review the Attendance help files for additional details.

1. Click  to select a **Site** from the home base screen before continuing.
 - **Please select a branch level to view.** Click the plus sign (+) to expand a selection. You can switch between list formats by clicking the **List View/Tree View** buttons. The selection you make here will filter what options are available from the **Organization** drop down list.
 - Highlight the Site you would like to work with, and then click **OK**.

Contributions


These options are active in Contributions if you own the Shelby Multi-Site Link program. Please review the Contribution help files for additional details.

1. Click  to select a **Site** from the home base screen before continuing.
 - **Please select a branch level to view.** Click the plus sign (+) to expand a selection. You can switch between list formats by clicking the **List View/Tree View** buttons.
 - Highlight the Site you would like to work with, and then click **OK**.
2. Site selection is also available from these reports:
 - **Pledge File List**
 - **Analysis Report**
 - **Statements** - your choice affects the grid on the **Columns** tab. **Run HQ Direct Contributions** check box available.
3. Purpose codes can be entered for each site at that site. Purpose codes can also be added at an upper level and HQ level, and then be used at the lowest site level. Example: you can set up company 9998 for district level 2 - 5 purpose codes and company 9999 for HQ level purpose codes for all sites. These purpose codes need to have a site set up specifically for purpose codes with a company number of 9998 or 9999.
4. You can specify what purposes go with what ACH record from the ACH Information tab. This keeps you from having to make transfers from the congregation to the headquarters.
5. The contribution batch entry dialog box allows you to check an option to give directly to the headquarters and not through lower sites.


General Ledger

These options are active in General Ledger if you own the Shelby Multi-Site Link program. Please review the General Ledger help files for additional details.


1. **Super Fund** – a five digit fund number is allowed (largest 30999) for up to 30 super funds where you can total across funds. Only available for Multi-Site Link customers.

 In the past, account numbers were made up of Company, Fund, Department and Account. The new structure consists of Company, Super Fund, Department and Account. The difference is an additional two digit number added to the existing Fund code. The Super Fund number can be used to group levels as well.

2. **Master Chart of Accounts** - if the Multi-Site Link program is being used.

 Headquarters is the only level that has access to the Master Chart of Accounts. This allows the Headquarter office to pull all account information into one consolidated report. Similar accounts from lower levels can be reported as one total amount. For example, every Postage account (whether each location uses the same account numbers or not) can be displayed as Total Postage in the Master Chart of Accounts.


3. A check was added for use of super fund in the following GL reports:
 - **Balance Sheet**
 - **Budgeted Financial Statement**
 - **Budget Report**
 - **Financial Spreadsheet**
 - **Fund Summary**
 - **GL Detail**
 - **Income and Expense**
 - **Trail Balance Work Sheet**

 The total level 9 will be cleared out on the income and expense reports and also when the super fund changes on all reports.

GlobaFILE

These options are active in GlobaFILE if you own the Shelby Multi-Site Link program. Please review the GlobaFILE help files for additional details.

1. Click the check box on the **GlobaFILE Information [Pick a Name]** screen to **Include names from other sites?** if desired. You will be able to see names from other sites but not update them.

 You can see the site name in the lower right side of this screen.

2. You will need to enter site information on the Misc. tab. The name entry screen will prompt you for a site if one is not entered. This way the record will be added to the correct site.
3. Choose the Site from the **Update Selected Fields** screen so that you can update multiple records to a Multi-Site.


Loan Processing


These options are active in Loan Processing if you own the Shelby Multi-Site Link program. Please review the Loan Processing help files for additional details.


1. Allows for five digit super fund (where you can total across funds) on the entry screen.

Membership

These options are active in Membership if you own the Shelby Multi-Site Link program. Please review the Membership help files for additional details.

1. Click  to select a **Site** from the home base screen before continuing.
 - **Please select a branch level to view.** Click the plus sign (+) to expand a selection. You can switch between list formats by clicking the **List View/Tree View** buttons.
 - Highlight the Site you would like to work with, and then click **OK**.

2. Click the check box on the **GlobaFILE Information [Pick a Name]** screen to **Include names from other sites?** if desired.
3. The name entry screen will prompt you for a site if one is not entered. This way the record will be added to the correct site.
4. Choose the Site from the **Update Selected Fields** screen so that you can update multiple records to a Multi-Site.
5. A branch filter has been added to Organizations and Levels. If left blank, then everyone can use and edit them otherwise only those that belong to MSL Level or Branch may used or edited.
6. To transfer a member and/or family from one site to another, click **Utility** on the menu bar. Highlight **Multi-Site Link Utilities** and then click **Membership Transfer**.
 - **Choose a Membership to Transfer** - click the appropriate radio button and then type or search for the field name. Click the **Next** button.
 - **Membership Transfer** - click  to choose the **To:** site. Click the check box to **Transfer entire Family** if desired. Click **OK**.

 You must have rights to both sites and be in the site the member is currently located in for the transfer to work.

Payroll

These options are active in Payroll if you own the Shelby Multi-Site Link program. Please review the Payroll help files for additional details.

1. Allows for five digit super fund (where you can total across funds) on the entry screen.

Purchase Order

These options are active in Purchase Order if you own the Shelby Multi-Site Link program. Please review the Purchase Order help files for additional details.

1. Allows for five digit super fund (where you can total across funds) on these screens:
 - **Purchase Order Entry**
 - **Purchase Order Inquiry**
 - **Purchase Order Inquiry Criteria**

Receipting

These options are active in Receipting if you own the Shelby Multi-Site Link program. Please review the Receipting help files for additional details.

1. Allows for five digit super fund (where you can total across funds) on these screens:
 - **Receipting - [Bank Account Information]**
 - **Add Bank Accounts**
 - **Fund Pick Screen**
 - **Receipt Entry**

Remittance

These options are active in Remittance if you own the Shelby Multi-Site Link program. Please review the Remittance help files for additional details.

1. Allows for five digit super fund (where you can total across funds) on these screens:
 - **Update Activity Set Up**

Selections and Listings

These options are active in Selections and Listings if you own the Shelby Multi-Site Link program. Please review the Selections and Listings help files for additional details.

1. Select a **Site** from the drop down list so that you will only view reports that belong to that Site and not all reports in the database.
2. You have two options for Site criteria: Sites and MSL information.

Security

Additional security has been added to the company drop down list on the home screen of all applications (if you own the Multi-Site Link program). This allows you to only view a selected group of individuals and/or

companies that you have set up security on. You can control what companies each person sees based on what Sites they have rights to access. There are two criteria options: Site & MSL.

For More Help

Contact Us

Technical Support

For additional answers to your questions, please use one of the methods below to contact Technical Support.

It is **IMPORTANT** for you to have the necessary information available such as your Customer ID Number, a description of the issue, and be at the computer where you are experiencing a problem. Refer to the **If Help is Needed and Shelby v5 Log Sheet** sections in the **General Operation/Installation Guide** for more information.

Shelby Systems Address:

Shelby Systems, Inc.

7345 Goodlett Farms Parkway

Cordova, TN 38016

(901)757-2372 or Toll-Free (888)MYSHELBY

(901) 757-0011 FAX

www.shelbyinc.com - web address

Getting Support on the Web:

pcsupport.shelbyinc.com - web address

Instructions for obtaining a required user name and password can be found on the Shelby PC Support site.

Contacting Support Projects by Phone / FAX or E-mail:

(Support Hours: 7:00 a.m. – 6:00 p.m. CST - Monday through Friday)

Project	Phone	Fax	E-mail
Installation Support	Toll Free (888)697-4352	(901) 259-3011	installation@shelbyinc.com
Shelby v5	Toll Free (888)697-4352	(901) 259-3017	v5support@shelbyinc.com
Donor/Headquarters using Shelby v5	Toll Free (888)697-4352	(901) 259-3016	dnhqsupport@shelbyinc.com
ShelbyMAILROOM	Toll Free (888)697-4352	(901) 259-3019	mailroom@shelbyinc.com
Shelby WEBVIEW	Toll Free (888)697-4352	(901) 259-3012	wvsupport@shelbyinc.com

Index

	A		
About Getting Started, 3			
About Other Applications, 7			
Add Site Information, 5			
Add Unit Information, 5			
Analysis Report, 8			
Attendance, 8			
	B		
Balance Sheet, 9			
Budget Report, 9			
Budgeted Financial Statement, 9			
	C		
Change History, 7			
Contact Us, 11			
Contact Us#Contacting, 12			
Contact Us#Getting, 12			
Contact Us#Shelby, 12			
Contact Us#Technical, 12			
Contacting Support Projects by Phone / FAX or E-mail, 11			
Contributions, 8			
	D		
Description, 3			
	F		
Features, 3			
Filter Site Information, 5			
Filter Unit Information, 5			
Financial Spreadsheet, 9			
Fund Summary, 9			
	G		
General Information, 3			
		General Ledger, 9	
		General Overview, 4	
		Getting Started, 3	
		Getting Support on the Web, 12	
		GL Detail, 9	
		GlobaFILE Information Tab, 5	
		I	
		Income and Expense, 9	
		Introduction, 2	
		L	
		Loan Processing, 9	
		M	
		Master Chart of Accounts, 9	
		Membership, 9	
		Memo Tab, 7	
		O	
		Other Applications, 7	
		Overview, 4	
		P	
		Payroll, 10	
		Pledge File List, 8	
		Prerequisite, 4	
		Purchase Order, 10	
		R	
		Receipting, 10	
		Remittance, 10	
		Reports To, 6	
		S	
		Security, 10	
		Security Tab, 7	

Selections and Listings, 10
Set Up Type Information, 5
Shelby Systems Address, 12
Site Information Tab, 6
Statements, 8
Super Fund, 6, 9

T

Technical Support, 12
Trail Balance Work Sheet, 9
Type Information, 5